



شركة الاستثمار الوطنية
NATIONAL INVESTMENTS COMPANY

GCC DAILY MORNING BRIEF

Tuesday, 22nd October 2024



DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP

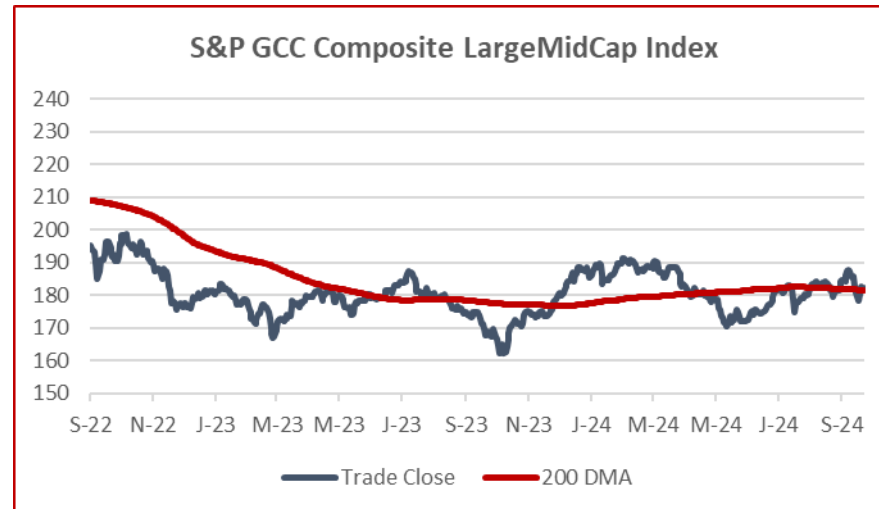


* Market Watch	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
GCC Markets										
Saudi (Tasi)	12,008.3	1.06	0.85	-1.78	-1.78	0.34	2.94	22.36	3.12	10,032.38
Qatar (QE Index)	10,607.1	-0.08	-1.18	-0.07	-0.07	-2.06	1.24	11.96	4.21	539.14
Dubai (DFMGI)	4,478.0	0.19	0.19	-0.57	-0.57	10.30	1.58	8.82	5.33	677.81
Abu Dhabi (ADI)	9,275.1	-0.14	-0.14	-1.60	-1.60	-3.16	2.69	16.80	2.07	2,628.29
Bahrain (BAX)	1,993.5	0.17	-0.32	-0.96	-0.96	1.12	0.90	10.38	4.58	7.72
Muscat SE INDEX	4,799.9	-0.21	-0.01	1.90	1.90	6.33	0.85	10.25	5.72	7.48
SP GCC Comp LMC	182.5	0.85	0.58	-1.66	-1.66	-1.30	1.74	14.31	3.83	857.79
SP UAE PRICE INDEX	138.7	0.19	0.19	-2.28	-2.28	0.64				

Developed Markets										
MSCI World Index	3,740.3	-0.34	-0.34	0.46	0.46	18.02				
U.S. (S&P 500)	5,854.0	-0.18	-0.18	1.59	1.59	22.73	4.87	28.40	1.52	52,189.40
U.K. (FTSE 100)	8,318.2	-0.48	-0.48	0.99	0.99	7.56	1.74	15.19	3.69	2,160.60
Japan (topix)	2,679.9	-0.34	-0.34	1.28	1.28	13.25	1.40	14.58	2.17	943,612.45
Emerging Markets										
MSCI EM Index	1,148.4	-0.58	-0.58	-1.92	-1.92	12.18				
China (SSE Composite)	3,268.1	0.20	0.20	-2.05	-2.05	9.85	1.36	12.00		44,025.04
India (Sensex)	81,151.3	-0.09	-0.09	-3.73	-3.73	12.34	4.33	23.36	1.14	160,248.15

Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Kuwait										
Kuwait All Share Index	7,026.9	-0.32	-0.75	-1.53	-1.53	3.07	1.45	15.02	4.00	42.45
Kuwait Premier Index	7,530.8	-0.20	-0.60	-2.31	-2.31	0.72	1.54	15.96	3.86	34.50
Kuwait Main Index	6,405.8	-0.84	-1.40	2.06	2.06	15.01	1.14	11.65	4.65	7.95
Kuwait Sector										
Banking	1,719.5	-0.31	-0.81	-1.92	-1.92	4.37	1.71	16.84	3.17	25.84
Telecom	1,003.1	0.04	-0.35	-2.43	-2.43	-9.24	1.47	12.10	8.38	3.06
Industrials	680.6	-0.49	-0.63	-6.20	-6.20	-25.04	0.73	10.61	10.33	2.32
Financial Services	1,413.3	-0.43	-1.13	0.19	0.19	16.58	1.16	12.67	2.89	4.74
Real Estate	1,390.9	-0.25	-0.56	1.11	1.11	14.67	1.07	15.22	2.05	2.96
Basic Materials	819.5	-0.39	-0.60	1.51	1.51	9.86	1.48	12.48	10.65	0.46
Health Care	470.7	0.00	0.00	0.00	0.00	-2.38	1.57	17.80	2.23	
Consumer Staples	1,033.6	2.10	0.13	2.97	2.97	56.95	2.20	20.88	2.03	0.31
Insurance	2,030.2	-0.57	0.54	-2.57	-2.57	-11.46	1.11	11.12	3.89	0.83
Consumer Discretionary	1,873.7	-1.20	-1.32	3.73	3.73	16.82				
Energy	1,124.0	-0.97	0.96	0.57	0.57	18.44	0.97	9.67	5.58	0.23
Technology	1,033.1	-1.39	-0.70	-28.64	-28.64	78.62	1.22	436.36		0.01
Utilities	384.2	-0.68	-0.68	-1.35	-1.35	-15.61				

* International and GCC Markets performance at the latest close.



What Move the GCC markets

Oil Prices

Oil prices fell on Tuesday, paring the previous day's nearly 2% rise as the top U.S. diplomat renewed efforts to push for a ceasefire in the Middle East, and as slow demand in China, the world's top oil importer, continued to weigh on the market.

Kuwait Market

The market down by 0.32% at 7,026.9 value traded 51.7 million KD, Premier market value reached 24.9 million KD down by -0.20% at 7,530.8.

KSA Market

The market closed by 1.1% at 12,008.3.

DAILY MARKETS WRAP,

NIC RESEARCH AND STUDIES DEP



* Description	Close Price	DTD	WTD	MTD	QTD	YTD	P/B	P/E	Dividend Yield	Market Cap (In LC Bn)
Blue Chip Watch										
Kuwait										
NBK	0.855	-0.23	-0.70	-3.17	-3.17	0.42	1.61	12.61	3.95	7.12
KFH	0.709	-0.28	-0.84	-0.98	-0.98	6.45	2.05	19.79	2.70	12.13
ZAIN	0.453	0.22	-0.22	-4.63	-4.63	-10.65	1.71	10.58	7.73	1.96
BOUBYAN BANK	0.536	-0.37	-0.74	-5.96	-5.96	-5.31	2.17	25.93	1.41	2.25
AGILITY	0.241	0.00	0.84	10.05	10.05	-14.91	0.70	7.80	8.30	0.65
Saudi Arabia										
ARAMCO	27.10	0.18	0.37	0.00	0.00	-17.88	4.34	15.04	7.01	6,558.37
SABIC	73.10	0.55	0.83	-2.40	-2.40	-12.46	1.34	114.05	4.51	219.31
STC	42.45	0.59	0.47	-2.86	-2.86	7.89	2.77	15.42	3.77	212.26
AL-RAJHI BANK	85.00	2.78	3.16	-2.52	-2.52	-1.73	2.92	20.49	2.82	340.01
NCB	34.90	1.16	0.43	1.75	1.75	-9.70	1.16	10.67	5.16	209.41
Abu Dhabi										
ETISALAT.AD	17.56	-0.57	-0.57	-5.08	-5.08	-10.59	3.48	13.77	4.64	152.71
FAB.AD	13.38	-1.04	-1.04	-2.62	-2.62	-4.15	1.15	9.16	5.31	147.81
EMIRATES NBD	19.90	-0.50	-0.50	-1.97	-1.97	15.03	1.02	5.58	6.03	125.70
DB ISLAMIC DB	6.23	0.65	0.65	-1.11	-1.11	8.92	1.02	6.83	7.22	45.11
EMAR.DU	8.59	2.26	2.26	-1.49	-1.49	8.46	0.98	6.31	5.82	75.92
Qatar										
QNB	17.700	1.09	-0.39	4.42	4.42	7.08	1.46	10.76	3.70	163.48
INDUSTREIS QAT	13.300	0.68	-0.60	1.99	1.99	1.68	2.14	15.44	5.26	80.47
QA ISLAMIC BK	21.200	-1.85	-2.75	-0.70	-0.70	-1.40	1.65	11.66	2.89	50.09
MASRAF AL RAYA	2.403	0.21	-0.50	-2.71	-2.71	-9.49	0.89	15.35	4.16	22.35
MESAIEED PETRO	1.626	-0.12	-0.79	-0.25	-0.25	-9.06	1.25	22.80	4.31	20.43
Oman										
BANK MUSCAT	0.265	-0.38	-1.12	5.16	5.16	0.38	0.84	10.09	5.85	1.99
OMANTEL	0.995	0.00	0.51	0.81	0.81	-6.13	1.20	11.64	6.03	0.75
BANK DHOFAR	0.168	0.00	0.00	7.01	7.01	5.00	0.70	15.86	4.61	0.50
NAT BANK OF OMAN	0.295	0.00	0.00	1.72	1.72	5.36	0.70	10.24	2.88	0.48
OMINVEST	0.372	2.20	4.79	5.68	5.68	-5.89	0.82	8.97	5.38	0.25

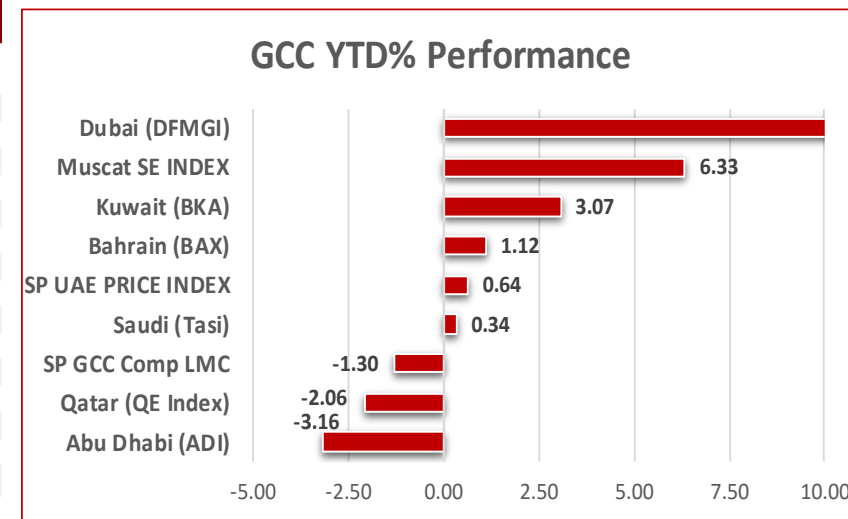
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Foreign Holding									
	NBK	GBK	CBK	ABK	KIB	BURG	KFH	BOUBYAN	WARBA
09-October. 24	24.73%	15.67%	0.06%	3.73%	7.96%	17.61%	12.99%	6.03%	5.84%
16-October. 24	24.73%	15.75%	0.06%	3.72%	7.91%	17.62%	12.98%	6.18%	5.85%

End of Report

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Sources, Bursa Kuwait , Refinitiv , NIC



* GCC Markets performance at the latest close.

Kuwait

The market is down today by -0.32 %The leading sector bottom performance indices today are Technology -1.39 % Consumer Disc -1.2 % Energy -0.97 % respectively

KSA

Saudi Armco has a positive performance today by + 0.18 %, SABIC have positive performance today by + 0.55 %, STC has a positive performance today by + 0.59 %, Al Rajhi Bank has a positive performance today by + 2.78 %



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